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TEXTILE INDUSTRIES IN AFRICA

(Note by the Secretariat)

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Textile Industries in Africa

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TEXTILE INDUSTRIES IN AFRICA

CHAPTER I

Introduction

1. The present study provides a brief survey of the textile markets and industries in 41 countries and territories in Africa. The areas not covered in this study are South Africa, Angola, Mozambique, Swaziland, Bechuanaland, Basutoland, etc. The coverage is divided according to sub-regions. Chapter II deals with East Africa; Chapter III deals with West Africa; Chapter IV deals with Central Africa and Chapter V deals with North Africa. Chapter VI deals with investment implications of reaching a high level of import substitution by 1975.

2. The over-all textile market in the whole of Africa (including South Africa) is placed around 5,100 to 5,200 million square yards in 1965, and the output of textile industries is placed around 2,000 million square yards. In other words, 39 yards out of every hundred needed for the home market are presently produced inside of Africa. This compares with a ratio of 28 yards in 1948 and 31 yards in 1955.

3. To put it alternatively, textile production in the countries of Africa has risen from 681 million square yards in 1948 to approximately 2,000 million square yards in 1965. This increase in home production of the order of 1,300 million square yards has been accompanied by a rise in the size of the African market from 2,000 million square yards in 1948 to 5,100 million square yards in 1965. In other words, impressive as the rate of absolute increase is, the African producer of textiles has provided only one yard for every increase of two yards in the overall market. In this gap lies the opportunity and challenge for the textile industries in Africa over the next decade and more. The surveys

of the organised textile industries (as distinguished from handicraft production) in the following chapters quantify this dependence on imports further and provide a country-wide appreciation of the developments which have taken place hitherto.

CHAPTER II

EAST AFRICA

4. From 1948 to 1950 the average annual market for textiles in the East African region came to 534 million square yards. This heterogeneous mixture grew to 711 million square yards per year over 1954 to 1965 and expanded further to 870 million square yards a year over 1960 to 1962. A very approximate, and somewhat less representative figure for 1964, a single year, would be in the neighbourhood of 936 million square yards.

5. Tables 1, 2 and 3 indicate the size of country-markets over 1948 to 1962, and within the limits of accuracy of population data, the levels of per caput consumption they imply.

Table 1. Textile Markets in the East African Sub-region: 1948-1950

Country	Total Home consumption 1948-50 (Av.An.)	Population (1949)	Per caput consumption d/
	(million sq. yds.)	(in millions)	(square yards)
Kenya Uganda Tanganyika	180	18.10	10.44
Zanzibar and Pemba	6	0.27	24.50
Somalia a/	9	1.77	5.76
French Somaliland	2	0.06	38.49
Ethiopia b/	114	14.70	8.15
Madagascar	52	4.00	13.65
Mauritius	10	0.46	23.50
Reunion	5	0.24	23.18
Rhodesia & Nyassaland Fed. of S. Rhodesia Zambia Malawi	91	6.00	15.92
Rwanda c/ Burundi c/	15	3.72	4.23
	485	49.32 mn	
5% margin for imports of clothing	+ 49		
	534	49.32 mn	10.83

a/ Population estimates are likely to be very low in the light of later Somali estimates which, however, are not based on a census.
b/ Excluding Eritrea. c/ Estimated. d/ Inclusive of imported clothing.

TABLE 2

Textile Markets in the East African Sub-region : 1954-56

Country	Total Home Consumption 1954-56 (Av.An.)	Population (1955)	Per caput Consumption[c]
	(million sq. yds.)	(in millions)	(square yards)
Kenya, Uganda, Tanganyika	243	21.35	9.66
Zanzibar	6	0.28	23.57
Somalia[a]	16	1.90	9.27
French Somaliland	9	0.07	14.14
Ethiopia	148	18.50	9.32
Madagascar	69	4.72	16.08
Mauritius	12	0.55	24.00
Reunion	7	0.29	26.56
S. Rhodesia, Zambia, Malawi	117	8.43	15.27
Rwanda, Burundi	19[b]	4.30	4.86
	646	60.39	
+ 10% margin for imported clothing	65		
	711	60.39	11.77

a/ See note preceding table

b/ Estimated.

c/ Including imported clothing.

TABLE 3

Textile Markets in the East African Sub-region : 1960-1962

Country	Total home consumption 1960-1962 (Av.An.)	Total home consumption (including imported clothing)	Population 1961	Per caput consumption [d]
	(in million sq.yds)		(millions)	(square yards)
Kenya	115	127	8.33	15.19 [e]
Uganda	81	89	6.81	13.08 [e]
Tanganyika	107	118	9.40	12.52 [e]
Zanzibar & Pemba	7	8	0.32	24.07
Somalia [a]	26	29	2.03 [f]	12.43 (5.2) [f]
French Somaliland [b]	3	33	0.07	47.15
Ethiopia [c]	147	162	20.42	7.92
Madagascar	68	75	5.58	13.41
Mauritius	15	17	0.66	24.99
Reunion	6	7	0.35	19.80
Rhodesia and Nyasaland	192	211	10.57	19.98
and				
Fed. of S. Rhodesia	81	89	3.72	24.04 [g]
- Zambia	72	79	3.28	24.04 [g]
- Malawi	39	43	3.57	12.07 [g]
Rwanda)	24	20	5.40	5.27
Burundi)				
	791 m.sq.yds.		69.94 m.	
+ 10% margin for imported clothing	79			
	870 m.sq.yds.		69.94 m.	12.44 sq.yds

a/ See note to Table 1.
b/ Imports into French Somaliland fluctuate in an extreme range.
c/ If the output on handlooms from handspun yarn were included, the per caput level would be higher by one yard or so.
d/ Inclusive of imported clothing.
e/ A small element of estimation concerning Uganda's exports to Kenya and Tanganyika enters into these estimates.
f/ Somalia's Five-Year Plan gives the population in 1961 at 5 million, and the figure in brackets is based on that estimate. It is felt that the figure in brackets is nearer reality.
g/ The over-all picture for S. Rhodesia, Zambia and Malawi is broken into country components on the rough hypothesis that per caput consumption levels in S. Rhodesia and Zambia are identical and that the per caput level in Malawi is half of the other two countries. Only sometime in 1966 will it be possible to verify these hypotheses.

6. Several other trends have been at work in the textile situation, though in vastly varying degrees from one country of the sub-region to another. These are :

(a) The emergence of rayon as a major fibre in the textile markets of the region is the most important of these. The inter-fibre position as it has evolved over the years (in spite of comparatively higher customs duties imposed on non-cotton fabrics) is presented in the next table.

TABLE 4

Share of Different Fibres in the East African Sub-region: 1948-1952

(In million yards)	1948	1955	1962
Cotton	403 (94.8%)	506 (80.1%)	721 (72.6%)
Rayon	7 (1.6%)	104 (16.5%)	211 (21.2%)
Wool	15 (3.5%)	17 (2.7%)	20 (2.0%)
Synthetics	-	6 (0.9%)	41 (4.1%)

The significance of these inter-fibre trends - particularly the growth of synthetics - in any normal evolution of the textile market should not be underestimated.

(b) The share of knitwear appears to have been rising.

(c) The shift to ready-made clothing, both imported and home-produced, has become sizable in all markets other than Somalia, and to a smaller extent Ethiopia. One consequence of this development is to reduce the cloth content of a garment. Thus, a factory will need between 2.25 to 2.50 yards to make an adult's shirt, whereas individual tailoring of the same shirt will call for 3 yards.

(d) The market in cotton greys has shrunk to a tiny fraction of its previous size.

(e) There has been a shift in favour of lighter fabrics, often accompanied by mixed fabrics made from more than one basic raw material. Unfortunately, the tables in the present study, using equivalent yardages based on fibre content, do not bring out this element clearly.

(f) As a result of the factors mentioned above under subparagraphs (a), (c), (d) and (e), and other generalised trends, there has been a positive up-swing in the quality (and therefore, price per yard) of cloth demanded by the consumer which, among other factors, has probably tended to inhibit the consumer's quantitative response to income increases.

(g) Textile supplies, for the region as a whole, are mostly derived from imports. Production within the region is in the neighbourhood of 200 million yards, or roughly a quarter of the total consumption. Production within the region is reviewed at greater length in the next section.

Production and Facilities in the Countries of the Region

7. Production of textiles in 1949 was confined to small, isolated plants, at least one of which (in Ethiopia) had been started in the 1930's. As of now, around 200 million yards of cloth are produced in the countries of the region, distributed as follows on the basis of available data :

TABLE 6

Estimated Output of Cloth in 1964

(including blankets, in million square yards)

Ethiopia[a/]	45-55 m. sq. yds.
S. Rhodesia	48 "
Uganda	35 "
Madagascar	20 "
Tanzania	12-15 "
Kenya	10 (?)
Sub-total	170-183
Other countries of the sub-region	30 m. sq.yds. approximately

a/ Excluding the output on handlooms from handspun yarn.

8. The industry in Ethiopia, according to available data, consists of 8 or 9 establishments and includes six composite mills - of which five are spinners, weavers and finishers, and one is a spinner, knitter and finisher There is one fair-sized wool knitting factory, supplemented by considerable production on a homecraft basis. A blanket factory, using mostly cotton strippings as raw material, has been opened recently. The plans to set up a staple fibre plant with a daily capacity of up to 40 tons seem to have run into some difficulties, but the plans to set up a woollen weaving mill as well as a rayon weaving plant are making progress.

9. In Southern Rhodesia the industry has taken several forms on a more horizontal basis than in the case of Ethiopia. As of now it includes : two spinning mills, four canvas and towel factories, five blanket manufacturing plants, four weaving plants working on calicoes, drills, denims, etc., several knitting factories with an annual output of 23 million square yards, five finishing factories and a few independent doublers.

10. The development in Uganda consists of a single composite unit, Nyanza Textiles at Jinja, which is believed to have produced about 15 million square yards in 1964. It is proposed to expand the capacity of this plant to 70 million square yards in the next few years. Another composite mill, with a capacity of 30-35 million square yards is in the process of erection at Jinja. These developments, as also the developments in Kenya and Tanzania, take place in the context of the East African Common Market.

11. In Tanzania, three cotton-weaving plants are supplemented by two rayon-weaving plants and a few knitting factories. One of the present weaving plants is in the process of adding spinning machinery. Five more projects involving spinning as well as weaving, and a capacity for production rated at 66 million square yards are in varying, early stages.

12. Kenya has a few knitting factories, one of which also spins staple fibre yarn and some production of woven rayon fabrics. Some schemes for further development are also believed to be in hand, but it appears that the main emphasis on textile development, under the East African Common Market framework, is in Uganda and Tanzania. A cotton mill, capable of producing 24 million square yards, is being erected at Kisumu.

13. The industry in Madagascar consists of one composite spinning, weaving, finishing plant with an annual output in the neighbourhood of 18 million square yards (2,000 tons). It is proposed to expand this plant over the next four or five years to double its present capacity. A new weaving plant is proposed at Tamtave capable of producing 500 tons (4.5 million yards) a year.

14. Burundi and Malawi have one blanket manufacturing plant each.

15. Considerable interest exists in Mauritius, Malawi, Rwanda and Burundi in setting up textile plants, but the proposals seem to be not yet quite definite. In Somalia a plant is proposed to

be set up at Balad with used West German machinery. The plant, it is proposed, will have 10,000 spindles, 366 looms and the necessary bleaching, dyeing and sizing plants, and is expected to produce 9.5 million yards a year.

16. Some general observations can be made about existing production facilities. Firstly, foreign participation, both at the private investor and state levels, is a frequent characteristic. Secondly, the foreign participation, almost invariably, includes expatriate participation in the technical and managerial cadres, although this tends to be significantly smaller in the Ethiopian textile industry. Thirdly, machineries employed are generally modern, of the type which can be briefly called "Europe - 1950's" type. Fourthly, a fair part of the machinery - this is a distinction normally seen in terms of individual mills rather than countries - is second-hand, although this is not true of the bulk of the machinery. Fifthly, man:machine ratios - the number of workers per 1,000 spindles from blowroom to spindle-point and the number of workers from winding to weaving per 100 looms - vary widely, but in general are higher than in better Indian mills and compare favourably with the more modern Pakistan textile industry which has come up almost entirely during the 1950's. Sixthly, fixed investment costs per unit of equipment vary widely, but are generally higher than in India or Pakistan for new mills. Seventhly, the creation of a labour force has not presented any serious problem in most cases, either in the matter of numbers required or in the imparting of requisite skills. This is so in spite of the higher levels of labour deployment. Finally, the industry seems to have some problems in working equipment (not workers, of course) on a seven-day week, three shifts a day basis.

CHAPTER III

WEST AFRICA

17. The West African textile market in 1963 might be approximately placed at 1,100 million square yards, or roughly one-fifth of the total market in Africa for apparel textiles. This aggregative position, however, is of recent evolution as may be seen from the figures given below :

	1948	1955	1960	1963
Estimated market in West Africa (in m.sq. yards)	421	885	1,008	1,100
Approximate per capita availability (sq. yds.)	7.7	14.3	15.0	15.5

18. The methods used in arriving at these figures are explained in an annexure, and the important qualifications to the data should be noted. Nonetheless, two broad propositions might be made.

19. One, between 1948 and 1955 the total textile market recorded its most impressive growth, namely 110% over the 1948 levels.

20. On the other hand, in the subsequent years, 1955-1963, the market increased only by 23%.

21. Alternatively, the average annual rate of growth during 1948-1955 was 15.7% and only 2.8% during the succeeding years upto 1963. The latter rate, as is indicated by the calculations of per capita availability, is thus more a function of the growth in the populations to be clothed rather than of the previous tendency to consume more cloth per person.

22. The factors involved in this slowing down are several but it should be recognized that slowing down in the quantitative aspects of increase has been accompanied by a shift to fabrics

of higher value per yard. As of now, the shift is of moderate size, but it nonetheless, limits the importance to be attached to mere quantitative trends.

Country-distribution of Textile Markets

23. Nigeria and Ghana (see Annexure for qualifications attaching to the Ghana data), between them, account for three-fifths of the West African consumption. In a broad sense, this situation has remained more or less constant over the years since 1948. Ivory Coast is the third largest market although it is a much smaller market than Ghana. Sierra Leone, and possibly some of the former French West African countries for whom it is not possible to work out individual data fall in the same broad group of market size as the Ivory Coast, namely, 40 to 60 million square yards. Other markets, such as Togo, Liberia, Portuguese Guinea, Gambia and some of the former French West African countries form the third group with markets smaller than 25 million yards per year.

24. Details are brought together below both for the latest year for which data could be readily worked out and for some earlier years.

Textile Markets in West African Countries
(Million Sq. yards)

	1948	1955	1960
Nigeria	194	406	429
Ghana	74	195	185
Sierra Leone	15	33	41
Gambia	5	8	14
Liberia	4	8	12
Portuguese Guinea	10	8	9
Togoland	4	9	8
Former French West Africa	115	218	310
of which Ivory Coast	N.A.	N.A.	58

(N.A. : Not Available)

Break-up of the Market between Different Fibres

25. In 1948, the West African textile market was for all practical purposes a single-fibre market, a market for cotton goods. By 1955, rayon had made very considerable inroads into the earlier predominance of cotton, and commanded about 26% of the textile market. It would appear that in the present condition of rayon technology, given the warm, humid climates in most West African countries, this was about the maximum proportion of the market that rayon could command, because the proportion of rayon declined moderately by 1960 to 24%. However, in part, this process was aided by the imposition of higher import tariffs on rayon goods in several countries.

26. It is also interesting to observe that in many of the smaller countries the predominance of cotton is greater than in the larger textile markets.

27. Wool, in the climatic conditions of West Africa, is statistically insignificant. Another group of fibres, namely, synthetics (mainly nylon) has at present the same statistical lack of importance as wool. But basically, the situation here is similar to that of rayon in 1948, although on a lower scale of probable expansion in absolute terms than rayon commanded in 1948.

28. Before presenting statistical data in country-wise detail of the relative fibre positions, it might be useful to add that a very large part of the rayon goods in the West African market are spun rayon goods.

29. The two tables below document and complete the statement of fibre-wise positions.

West African Textile Market According to Fibre

(M.sq.yds.)	1948	1955	1960
Cotton	408	653	755
Rayon	12	229	239
Wool	8	9	10
Synthetics	-	1	7

Distribution of Country Markets according to Fibres : 1960

(m.sq.yds.)

	Cotton	Rayon	Wool	Synthetics
Nigeria	317	106	4	2
Ghana	139	44	2	-
Sierra Leone	35	6	-	-
Gambia	10	4	-	-
Liberia	11	1	-	-
Portuguese Guinea	9	-	-	-
Togoland	8	-	-	-
Former French West Africa	226	78	-	5

Extent of Home Production

30. The bulk of the West African requirements of textiles - perhaps some 80% - are met by imports. In the case of cotton textiles, dependence on imports is the least, and yet well over 70% of the supplies needed came from abroad in 1963. (In the production of grey bafts, the proportion of West African production is much higher). In the case of rayon goods, dependence on imports is perhaps as high as 90-95%. Finally, in the case of wool and synthetics, dependence on imports is total.

31. In short, out of the approximate market of 1,100 million square yards in 1963, less than 220 million square yards are likely to have been made in West Africa, after making some arbitrary allowance for the small scale (in terms of absolute production) handloom industries in several West African countries.

32. Manufacturing industries mainly exist in Nigeria and two or three other countries on any worthwhile scale, and typically take one of three forms : composite spinning and weaving mills for cotton textiles; purely weaving units (generally using imported yarns) for cotton and/or rayon goods; and hoisiery factories again generally using imported yarns. The growth of non-apparel textile industries, such as fishing nets or tyre cord, is more or less absent.

33. In terms of projected growth, widespread dispersal of the industry is about to take place. Indeed, one estimate is that nearly a score of cotton textile mills are in the process of being planned. A development of significance, in this connection, is the erection of a major finishing plant with a capacity of several million yards, some fifty miles out of Accra, in Ghana. (This plant will depend upon imports of grey cloth).

CHAPTER IV

CENTRAL AFRICA

34. The total annual market for textiles made out of soft fibres in the six countries of the Central African sub-region is placed around 262 million square yards over 1960 to 1962. A preliminary estimate for 1965 would raise the market to a level around 288 million square yards.

35. Congo (Leo) is the single largest country-market, accounting for 153 million square yards, or 59% of the total availability. Other country-markets are much smaller in size, as may be seen below.

Textile Availability
in 1960-1962 (average)

Cameroun	39.8	million	sq. yds.
Congo (Brazzaville)	27.8	"	" "
Chad	15.1	"	" "
Central African Republic	14.6	"	" "
Gabon	11.5	"	" "
Congo (Leo)	153.2	"	" "
Central African Sub-region	262	million	sq. yds.

36. The distribution of the above market in terms of fibre is presented in the following table :

Distribution of the Market according to Fibres
(in million square yards)

	Cotton	Wool	Rayon	Synthetics	Cloth content of imported clothing *	Total country market
Cameroun	27.6	0.4	4.8	1.6	5.4	39.8
Central African Republic	9.9	-	1.6	1.1	2.0	14.6
Chad	11.4	-	1.1	0.8	1.8	15.1
Congo (Braz)	19.8	-	2.9	-	5.1	27.8
Congo (Leo)	120.6	4.0	12.2	0.6	15.0	153.2
Gabon	8.4	-	0.8	0.3	2.0	11.5
Sub-region	197.7	5.2	23.4	4.4	31.3	262.0

* Estimated from import data, but not distributed according to fibres in the table.

37. If allowance is made for the likely distribution of the cloth content of imported clothing, the overall picture in fibre-terms would be somewhat modified, and the share of cotton, the predominant fibre, would be around 80%, followed by rayon at around 13%. Synthetics, a fast growing group (mostly nylon and polyester fibres) would account for 4% and wool, a declining group in relative terms, would account for 3%. The overall validity of this picture is somewhat amended in individual country-terms, because the availability of wool textiles is limited to Congo (Leo) and, in a smaller degree, to the Cameroun.

38. In overall terms, production of cloth in the countries of the sub-region amounts to 98 to 102 million square yards, or around 36 - 37% of overall requirements. Country-wise details of existing facilities as well as plans in hand are provided in

later paragraphs, but it might be mentioned here that output in the Congo (Leo) industry amounts to over 91 million square yards and the Central African Republic accounts for another 6 million square yards. The present output of the remaining four countries is not believedto exceed 3.5 million square yards.

39. Conversely, it can be said that the sub-region as a whole depends on imports for every two out of three yards of cloth it consumes, the dependence being almost total for the case of countries other than Congo (Leo) and the Central African Republic. As of 1963, this dependence on imports involved an outlay in foreign exchange of over 48 million US dollars as detailed in the following table.

Imports of textiles and textile products in 1963
(Q = ton; V = thousand US dollars)

	Central Africa		Congo (B)		Gabon		Chad		Congo (DR)		Central Africa (Cameroun excluded)		Cameroun	
	Q	V	Q	V	Q	V	Q	V	Q	V	Q	V	Q	V
Cotton	806	2483.9	893	2993.3	529	1565.3	838	1969.3	5400	9780.2	8466	18792.0	2339	5428
Synt. Text. (cont).	76	277.8	132	701.7	68	169.6	67	170.6	512	1682.7	855	3002.5	152	242
Synt. Text. (non-cont)	4	21.8	12	92.4	10	62.5	9	37.5	156	468.4	191	682.6		
Other natural text.	99	62.9	13	12.9	-	1.1	219	156.8	44	40.1	475	273.8	1011	3284
Hosiery	65	326.1	68	482.9	51	339.8	44	170.2	97	558.9	325	1877.9		
Clothes and access.	104	835.1	185	1432.4	229	1713.1	142	733.3	683	2374.3	1343	7088.2		
Other manufactured articles	347	369.4	374	605.4	200	373.0	260	258.2	419	793.9	1600	2399.9	4190	2481
Second-hand clothes	829	450.1	272	167.2	115	66.4	326	233.8	486	859.8	2028	1777.3		
T o t a l	2330	4827.1	1949	6828.4	4202	4290.8	2005	3729.8	7797	16558.3	15283	35894.2	7692	11435

Source : Statistics of European Economy Community, UDE and Democratic Republic of the Congo.

40. The country-wise levels of per caput consumption vary between 4.69 square metres (Chad) and 28.9 square metres (Congo-Brazzaville). The following table summarizes the position and brings out two major elements which are strongly correlated - namely, level of per caput income and the incidence of urbanization.

Country	Per Caput Availability of textiles (1960-62) average	Rank according to - Per Caput Availability	Per Caput Income (1960)	Population of Urban to Total Pop.
Congo (Brazz)	28.59 sq.metres	1	2	1
Gabon	21.89 " "	2	1	4
Central African Republic	9.89 " "	3	5	3
Congo (Leo)	8.82 " "	4	4	2
Cameroun	7.99 " "	5	3	4
Chad	4.69 " "	6	6	5
Sub-region	9.43 " "			

Country-wise Statement of Existing Industries and Plans

Congo (Leopoldville)

41. The textile industries proper are mostly engaged in the spinning of cotton (and to a smaller extent of rayon staple), weaving and printing. As of June 1963, the industry comprised 14 units, possessing in all over 90,000 spindles and 2,400 looms. The units and the nature and extent of vertical integration in their activities is brought out below :

No. of exclusively spinning units	3 units
No. of exclusively weaving units	2 "
Spinners and weavers	4 "

Spinners, weavers and printers	2 units
Spinning, weaving (sack making)	2 "
Printing exclusively	1 "

42. Alternatively, in the soft-fibre field (i.e., other than sack-making), there were 9 spinners, 8 weavers, and 3 printers. The industry thus was characterized by five types of organizations : single process operation on the raw material, whether cotton or rayon staple; single process operation based on manufactured inputs, viz : exclusive weaving and exclusive printing; composite mills which combined spinning and weaving; composite mills which were integrated up to spinning; and composite mills which do their own making up of garments.

43. In addition, six factories make hosiery, based mostly on imported yarn.

44. The output of these factories covers a wide range : yarns, cotton, staple and mixed; cotton prints; blankets; sewing threads, woollen and synthetic fibres and mixtures thereof; industrial cloth and so on.

45. Several new projects, mainly extensions in existing factories, are under way. The bulk of the cotton consumed in the textile industry of Congo (Leo), around 12,000 tons, is derived from internal supplies.

46. Central African Republic has a singly textile mill, ICOT, which is reported to have produced 5.5 million square yards in 1964, the bulk of the output being exported to Chad and other UDE countries. It is now decided to merge this plant in another company, ICCA, which is establishing an additional plant near Bangui. The new plant will be vertically integrated from spinning to printing, and will have a larger annual output of around 8 million square metres. On completion

in the middle of 1966, the two plants will account (on a yearly basis) for 2,000 tons of the Central African Republic's cotton crop of 10,000 to 11,000 tons.

47. Plans for another plant with 15,000 spindles, 320 automatic looms and (eventually) dyeing and printing facilities are also being considered. One hosiery unit, CIOT, exists near Bangui.

48. Cameroun does not have, as yet, a textile industry, although it produced 16,000 tons of cotton in 1962/63. A spinning and weaving mill is proposed to be established in northern Cameroun with an annual output of 6 to 7 million metres. This plant will cater to the market in Chad as well of certain categories of textile goods in accordance with an agreement signed by the two countries in April 1963. There is also a further proposal for the establishment of a dye works at Douala, although no details are available. Two hosiery factories exist.

49. Chad does not have a textile industry at present, although it produced 33,000 tons of cotton in 1962/63. One project has been envisaged with an investment of 8 million US dollars, rising in three stages to 15 million square metres by 1973. Plans for a blanket factory have also been considered.

50. Congo (Brazzaville) has concluded an agreement with the People's Republic of China to build a textile mill which will have an annual output of 3.4 million square metres. The plant is expected to come into operation by the end of 1968. Other plans considered at various stages have included a printing plant based on imported cloth and a hosiery plant.

51. Gabon does not have a textile industry and there do not appear to be any immediate plans.

52. In summing up, it might be said that country-wise plans in the near-term imply the additional production of more than 36 million square meters. Making allowances for possible non-coverage of plans, an upper limit of 50 million square meters is probably on the optimistic side. This is to be contrasted with the current (1962 - 66) import level of around 133 million square yards on the one hand and the additional growth of the market by 1975 of the order of more than 100 million square yards on the other. In other words, existing plans (and not all of them can be described as definite) imply a coverage of only 27% of the existing imports and of around 20% of the likely import level by 1970. In other words, in an area which produced 76,000 tons of cotton in 1962-63, existing development accounts for 12,000 tons or so of raw cotton and proposed development will account for less than 6,000 tons.

CHAPTER V

NORTH AFRICA

53. The home market for textiles in the North African sub-region as of 1960-62, exceeds 1,743 million square yards. The following table provides a breakdown of the various country markets according to fibres, the size of the total market by countries, and the approximate level of per caput availability.

Home Markets for Textiles : 1960 to 1962 (average)
(in million square yards)

Country	Cotton	Wool	Rayon	Synthetics	Total Home Market	Per caput availability
UAR	812	18	83	4	917	34.53 sq.yds
Sudan	235	1	34	-	270	22.30 " "
Libya	20	1	10	-	31	25.62 " "
Algeria	84	13	68	12	177	15.69 " "
Morocco	112	24	114	11	261	21.88 " "
Tunisia	55	7	22	3	87	20.62 " "
Sub-region	1,318	64	331	30	1,743	25.90 sq.yds.

54. Trends characteristic of other parts of Africa have been present in the North African sub-region, although it is clear that the significance of the trends varies from one country to another. The most significant of these trends are indicated below.

(a) Cotton is the predominant fibre and accounts for 71 per cent or thereabouts of all fabric consumption (inclusive of an allowance for the fibre consumption of imported clothing).

(b) Climatic considerations favour wool in this sub-region during some parts of the year, although synthetic fibres of the polyester type have made a major impact. The latter impact is primarily seen in imports of clothing and the preceeding table understates their role in the market.

(c) Rayon has been the principal growth fibre in the years since 1948 and accounts now for nearly 20 per cent of the yardage consumed in the North African sub-region. It appears that the rate of its relative growth has slowed down in recent years.

(d) The data pertaining to Algeria reflects the fact that over 1953 to 1962 the per caput availability of textiles has declined by 25 per cent or so, the main factor responsible being the economic setback which accompanied the struggle for independence. In many of the other countries, including the UAR, the quantitative textile response to increases has slowed down and it seems probable that future increases in per caput income will induce smaller increases in per caput availability of textiles.

(e) The present level of dependence on imports varies from nil in the case of the UAR (which is a substantial exporter of textiles) to over 75 per cent in most of the other countries. In 1963, imports of textiles into the countries of the sub-region totalled U.S. $ 319 million, as is seen below :

Imports of Textiles and Textile Products (1963)
(in million U.S. dollars)

Algeria	77
Libya	37
Morocco	34
Sudan	109
Tunisia	62
U.A.R.	Negligible

Source : United Nations, Yearbook of International Trade Statistics, 1963)

55. The present position in respect of manufacturing facilities is reflected in the following table relating to the output of yarn and cloth.

Output of Cotton Yarn and Cloth (1963) in North Africa

Country	Cotton yarn	Cotton cloth
Algeria	200 tons	negligible
Libya	Nil	negligible
Morocco	4,300 tons	5,800 tons
Sudan	4,230 "	3,927 "
Tunisia	836 "	1,646 "
U.A.R.	122,450 "	83,700 "
Sub-region	127,786 tons	94,573 tons

56. The output of wool yarn and cloth is distributed as follows, and again shows the impressive performance of the U.A.R. industry:

Output of Wool Yarn and Cloth in North Africa (1963)

Country	Wool Yarn	Wool Cloth
Algeria	200 tons	-
Morocco	1,800 "	500 tons
Tunisia	160 "	-
U.A.R.	9,600 "	3,100 "
Sub-region	11,760 tons	3,600 tons

57. The production of rayon yarn, continuous filament as well as staple, is confined to the U.A.R. and in 1963 amounted to 12,100 tons. A small nylon plant also exists in the U.A.R. and its output is in the neighbourhood of 350 tons per year.

58. The textile industry in Egypt is more developed than in any other country in Africa and employs a labour force of well over 200,000. The equipment involved in the cotton sector alone comes to 1.4 million spindles and over 23,000 looms. In recent years the U.A.R. has emerged as a significant exporter of textiles, both in the form of yarn as well as cloth, as may be seen below :

Year	Cotton yarn production	Exports of yarn	Exports of yarn as percentage of production
1953	59,000 tons	5,400 tons	9
1960	102,000 "	19,900 "	20
1964	131,000 "	32,740 "	25

	Production and Exports of Cotton cloth	yarn
	(in millions)	
1953	319 sq. metres	1,000 tons
1960	482 " "	12,900 "
1964	382 " "	16,700 "

59. Exports of cloth are roughly estimated to form in 1964 around 20 per cent of the output of cloth.

60. In brief, the North African sub-region comprises, in terms of development of textile industries, two distinct groups. The U.A.R. forms the first group where a sizable industry exists and in which import dependence for fabrics is altogether absent. The other countries - Algeria, Libya, Tunisia, Sudan and Morocco - are, in the main, textile producers on a very small scale in relation to the size of the various markets.

CHAPTER VI

Perspectives for 1975 : Investment and other Implications

61. The prospective market for textiles in 1975 (and in some cases 1970) has been analysed in several studies which are not always strictly comparable to each other. Broadly speaking, estimates for the East African sub-region[1] and the Central African sub-region[2] are comparable and more detailed. The estimate for West Africa is provisional and a definitive version is in the course of preparation for a meeting in 1966. The estimate for North Africa is a provisional one and adapted from a note by a consultant without further examination by the secretariat. In any case, as will be seen below, the estimates relate to two different points in time. Notwithstanding these limitations, it is clear that a large investment effort of the order of US $ 1,200 to 1,300 million per year up to 1975 - is called for if import dependence is to be reduced to the extent indicated in the statement below :

A. East African sub-region

1.	Current output	200 million sq. yds.
2.	Current demand	870 " " "
3.	Current import dependence (2-1)	670 " " "
4.	Targeted production in 1975	1,300 " " "
5	Additional output by 1975 (4-1)	1,100 " " "
6	Investment requirements for fixed capital for the additional output	US $ 261-439 million

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1/ See E/CN.14/INR/86: The Textile Industries in the East African Sub-region - Present Situation and Growth Prospects, Chapters V and VI.

2/ See section on textiles in the revised version of the forthcoming Report of the ECA Mission for Economic Co-operation in Central Africa.

B. Central African Sub-region

1.	Current output	102 million sq. yds.
2.	Current demand	262 " " "
3.	Current import dependence (2-1)	160 " " "
4.	Targeted production in 1975	276 " " "
5.	Additional output by 1975 (4-1)	174 " " "
6.	Investment requirements for fixed capital for the additional output	US $ 68 million

C. West African Sub-region

1.	Current output	220 million sq. yds.
2.	Current demand	1,050 " " "
3.	Current import dependence (2-1)	830 " " "
4.	Targeted production in 1970	1,125 " " "
5.	Additional output by 1970 (4-1)	905 " " "
6.	Investment requirements for fixed capital for the additional output	US $ 350-400 million

D. North African Sub-region

It has been estimated that current plans and projects involve an expenditure of US $ 277 million and which will become fully operational by 1970. At the same time, it has been further estimated that the total elimination of import dependence will call for a further investment of US $ 181 million. Even if the latter is taken as unrealistic, an additional investment of US $100 million or so will be required, making for a total investment of US $ 377 million.

62. If the figures for West Africa and North Africa are adapted for 1975 on a necessarily ad hoc basis, the investment in fixed capital required to match the targets of additional output would come in the range of US $ 1,200 - 1,300 million.

63. Greater awareness of the problems involved is gained when it is realised that the targeted increases in output involve a quintupling of current output levels in the East, Central and West African sub-regions and more than doubling of the output in the North African sub-region.

64. It would be unrealistic to ignore the implications in terms of personnel. As broad orders of magnitude[1/], it is suggested that the textile industries will need additional 7,700 junior and senior technicians over and above other managerial skills and will need to create a labour force of the order of 360,000.

1/ For a detailed assessment of the personnel requirements in the East African Sub-region, see E/CN.14/INR/86.

ANNEX

65. Figures of fibre consumption, exports and imports are regularly published by the FAO. These figures are available, in varying coverage up to 1962.

66. For the purpose of this paper, the FAO figures were converted into yardage by applying the standard FAO ratios except that in view of the difficulty of distinguishing between rayon and synthetics, these were amalgamated and the cotton conversion figures used. With this as the basis, all other statistical material has been worked out independently at the ECA and, in part, derived from an earlier study : Industrial Growth in Africa, A Survey and Outlook, 1962 (E/CN.14/INR/1).

67. The application of standard ratios, it is realised, is not entirely satisfactory. This seems to be particularly true of Ghana where fabrics in use are heavier and the use of FAO ratios yields market and per caput data which are higher than actuals. ECA proposes, at a future date, to build up all these series independently of FAO data and directly from data regarding output, imports and exports.

68. Estimates for 1963 are based on extrapolation of fragmentary data, but care has been taken to avoid over-estimation.

69. Per caput figures do not take into account the results of the Nigerian census of 1963.